

Interface Module - Exports

The Interface module – Exports, allows the user to export data from the Web Work system. It is a generic interface module, which creates a text file that can be used to export information from Web Work. The Interface module – Exports, is designed to create ASCII text fields and allows the user to map the fields and information that is exported. Once an interface is setup, it can be updated by the user to incorporate changes to third party software. This chapter describes how to setup and use the Interfaces – Exports Module.

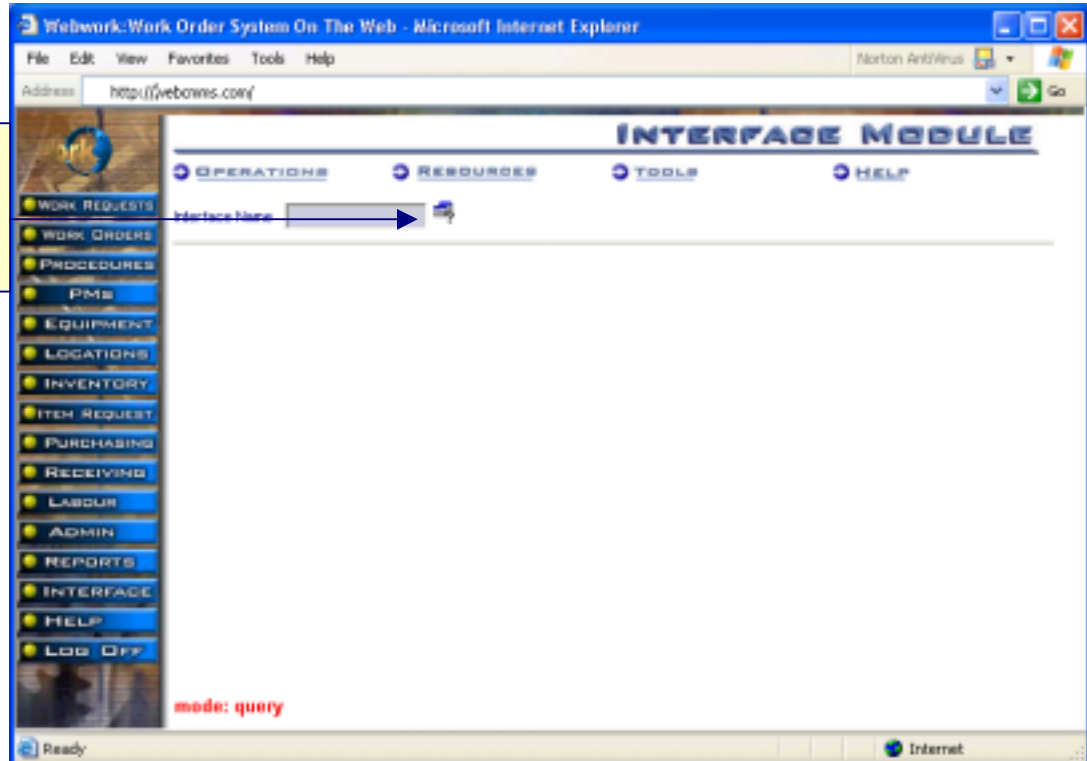
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1.1 Interface - Operations

To access the Interface module, click on the **INTERFACE** module button  on the left hand side of the screen. The Interface module will open in query mode as pictured below:

Click on the QUERY button to view a list of Interfaces that have been setup in the Web Work system.





The **OPERATIONS**  **OPERATIONS**, **TOOLS**  **TOOLS** and **HELP**  **HELP** drop down menus contain the various features available in the Interface module.

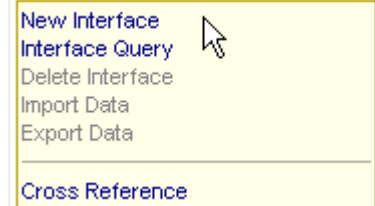


Web Work includes “help files” for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field

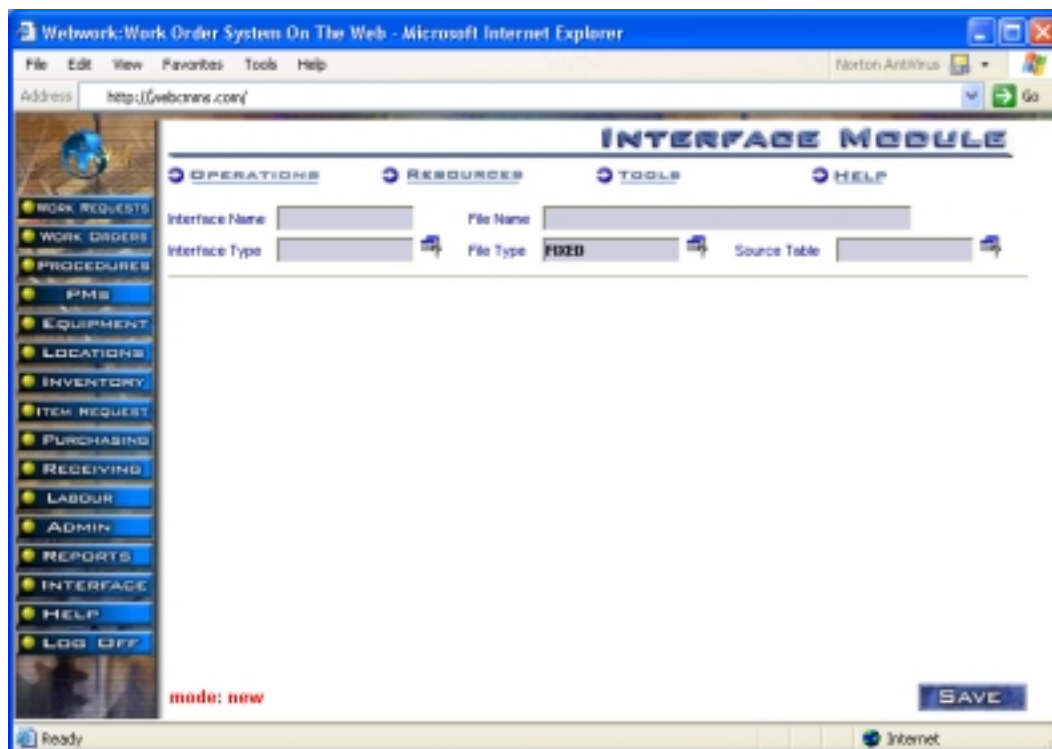
2.1 Creating New Interfaces


To create an interface:


- To access the Interface module, click on the **INTERFACE** module button  on the left hand side of the screen.
- Click on the  **OPERATIONS** menu at the top of the screen to view the drop down menu.
- Select "New Interface" from the drop down menu. The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode, new mode)



The Interface module will open in New mode as pictured below:




- Enter a name for the Interface into the Interface name field.
- Enter a name for the File into the File Name field.
- Enter Export into the Interface Type field.
- Enter a File Type or click on the **QUERY** button  to select a type from those listed in the Web Work database.


- Enter the Source Table or click on the **QUERY** button  to select a table from those listed in the Web Work database.

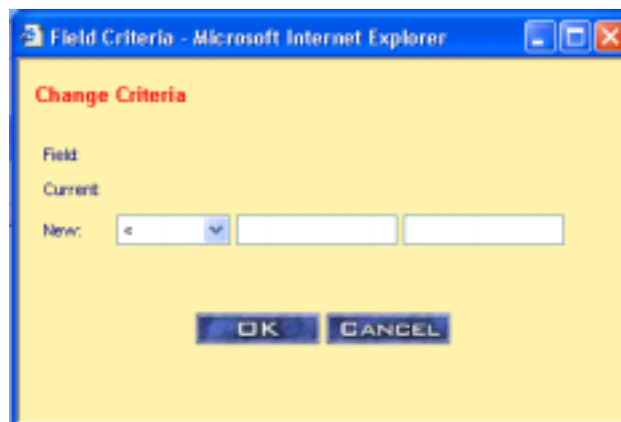



NOTE: Additional Queries can be added to the source table list. Please contact your Software Vendor for more information.


- Click on the **SAVE** button , which will save the information and open a table similar to the one pictured below. This table was created based on selecting the Accounts table.

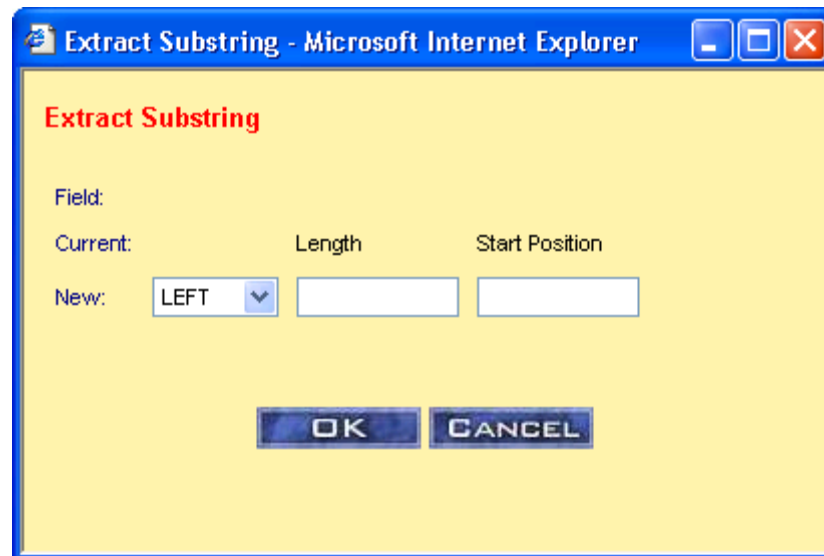
WW Field	Save	Aggregate	Ext Field (optional)	Start	Len	Criteria	Set	Extract	Set	Format	Dec Place	Dec Point (Y.N)	Constant	Cross Ref	Del	Save
Not Used																
WW Field	Save	Aggregate	Ext Field (optional)	Start	Len	Criteria	Set	Extract	Set	Format	Dec Place	Dec Point (Y.N)	Constant	Cross Ref	Del	Save

- Click on the down arrow in the WW field column to select the field(s) you wish to include. One row is created for each field selected. In each of the rows, pertinent data can be entered.
- Click on the down arrow  to select an Aggregate if applicable. IE: Sum, Average, Group By or Where.
- Enter the name of the field in the external program. For instance in the Web Work Employee field may be called Empid in another program. This is an optional field.
- In the Start column enter the starting position of the field in the output file.
- In the Len column, enter the length you wish the output field to be.
- The Criteria column is a read only field. To set the criteria, click on the “...” in the Set field to the right hand side of the Criteria column. The set criteria window will open as shown below:



- Enter selection criteria as applicable and click on the **OK** button  to save the criteria and close the Field Criteria screen.
- The Extract column is used to specify the parts of a string you wish to extract. The extract column is read-only. To setup the Extract details click on the "..." in the Set field at the right of the Extract field.

For instance if a General Ledger code is ELEC00421, you may wish to only extract the numerical portion of the code. Click on the three dots  in the Set column to the right of the Extract field to open the Extract Substring window as shown below.



- Click on the down arrow  and select Left, Right or Middle from the drop down list.

Enter the length of the field. If you are uncertain of the length you can use a number, which you know is larger than the largest code. This can also be used when items will be of varying lengths.

Enter the Start position. For example: If you entered a 5 into this field, the first four digits of the code will be ignored and the export will begin with digit five.

Click on the **OK** button  to save the Extract Substring information.

- Enter the format you wish to use into the format column. For example the date format in Web Work is d/m/yyyy, but you may wish the date to be formatted in the export file as yyyy/mm/dd.'
- Enter the number of decimal place if applicable into the Dec Place column.
- Enter Y or N into the Dec Point (Y/N) column.



If the Dec Point Y/N is left blank it is assumed no decimal point is required.

- Enter a Constant Value. You may wish to include a value for each record that is exported in the export file, which contains a constant value. An example of when this would be used is if the other software has a field that Web Work does not have. This can only be used if the field is left empty.
- Enter the cross reference or click on the query button to select a cross reference that has already been setup. See Interfaces – Exports, Cross References further on in this manual for more information on setting up cross-references.
- Click on the **UPDATE** button to update this row of the Export Interface you are working in.

You can now continue adding fields to this Export Interface, Export the file (see instructions further on in this section of the Web Work manual) or continue working with another Web Work module.

3.1 System Parameters

When setting up the export information, Web Work has some built in system parameter.

The system parameters are:

1. System Date – If you would like all dates to be the date of the export, enter system date in the constant field of a row that does not contain a WW field. When using system date you can also choose the format (in the format column ie: mm/yy. When the file is exported each record will contain the date of the export in the format specified.
2. Sign – If you would like all numbers to include a + or – sign as applicable, you can set this up so that an additional column beside numbers exported will indicate + or -. For example if the Web Work field is called Totalcost. Enter Totalcost in the WW field column and sign in the format column. Then enter Totalcost in another WW field as well. The first Totalcost field will indicate + or -. The second Totalcost field will indicate the numerical value for this field.
3. Counter – If you would like the exported records to be numbered 1,2,3, 4 etc, you can set this up in your export interface table. To set up the counter, simply enter counter in the constant field, in a row that does not contain a WW field.

NOTE: Total cost must be setup in 2 rows if you wish to have a numerical value and a + or – value indicated.



Enter sign in the format column if you wish to have a + or – sign for the numerical field you have setup.

WW Field	Save	Set Field (optional)	Start	Len	Criteria	Set	Extract	Set	Format	Dec Place	Dec Point (Y/N)	Constant	Cross Ref	Dec Save
Not Used														
Employee			1	50					system			system date		
TotalCost			1	5					sign					
TotalCost			1	5								counter		
			1	5										

Enter counter in the constant column to include record numbering for the export file.




4.1 Editing Interface Information

To edit interface information:

- To access the Interface module, click on the **INTERFACE** module button  on the left hand side of the screen.
- By default the Interface module opens in Query mode.
- Perform an interface query to locate and retrieve the applicable query. See performing Interface Queries for more information on queries.
- Edit information as required.
- Click on the **SAVE** button  to save the updated information.

5.1 Deleting Interfaces



To delete an interface:

- To access the Interface module, click on the **INTERFACE** module button  on the left hand side of the screen.
- By default the Interface module opens in Query mode.
- Perform an interface query to locate and retrieve the applicable query. See Interface Queries for more information on performing interface queries.
- When the applicable query is open, click on the  **OPERATIONS** menu at the top of the screen and select Delete Interface from the drop down menu.
- Click on the **SAVE** button  to save the updated information.

6.1 Performing Interface Queries




Perform a query, to access interfaces that have already been setup in the Web Work system.

To perform an Interface Query:

- To access the Interface module, click on the **INTERFACE** module button  on the left hand side of the screen.
- By default when you enter the Interface module you will be in Query mode. If you have been working elsewhere in the Interface module, click on the  **OPERATIONS** menu at the top of the screen to view the drop down menu.
- Select "Interface Query" from the menu. The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode, new mode)

- The Interface module will open in query mode as shown below:

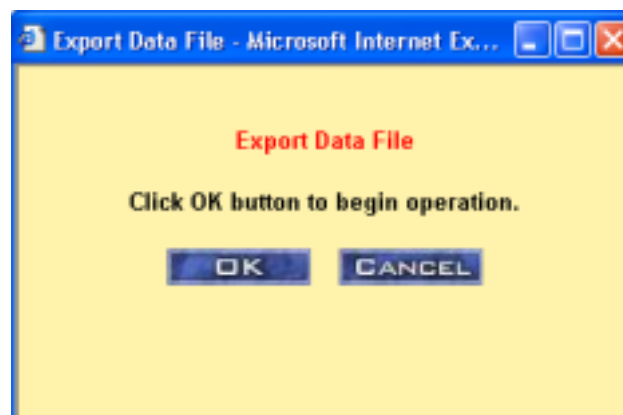
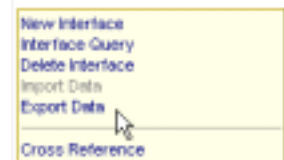




- Click on the **QUERY** button  to open the Interface Selection screen.
- Click on the **RADIO** button  beside the applicable interface.
- Click on the **OK** button  to open the interface.

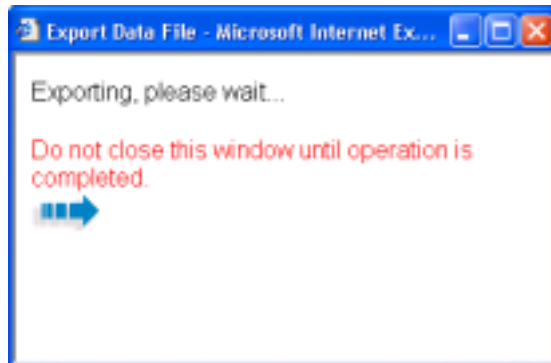
7.1 Exporting Files

To export a file from Web Work:

- Set up the interface as explained at the beginning of this chapter.
- Click on the **OPERATIONS** menu and select Export Data from the drop down menu. The Export Data File screen will open as pictured below.

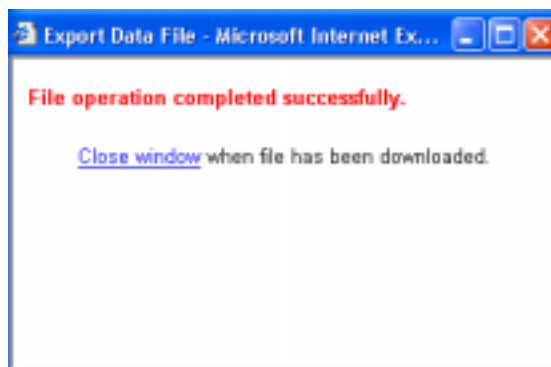


- Click on the **OK** button  to begin the Export or on the **CANCEL** button  to cancel the operation.



DO NOT close the Export Data File window while the file is being exported.



- When the file is finished being exported a screen confirming the file has been successfully exported will be displayed. Click on Close Window to close the export interface file window and return to Web Work.



8.1 Creating Cross References

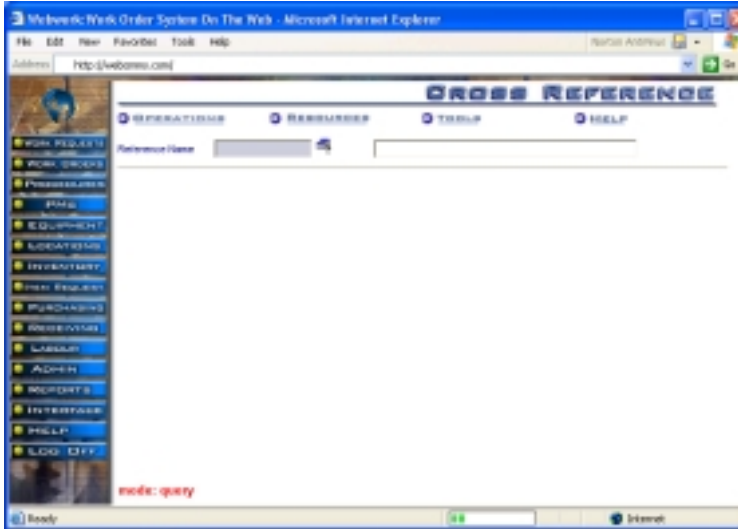
Cross References are used to transpose data from the import file to Web Work. An example would be fuel Cross References are used to transpose data from Web Work to the Export File. If your Web Work code differs from your external program's code you can create a cross reference so that when an item is exported from Web Work the code will be updated to reflect the external program code.

To Create a Cross Reference:

- Click on the **INTERFACE** module button  on the left hand side of the screen to open the Interface module.
- Cross References is contained within the Interface module. Click on the  **OPERATIONS** menu and select Cross Reference from the drop down menu.



The Cross Reference screen will open in Query mode as pictured below:




When Cross Reference is opened, the menu selections under Operations change. To return to Interfaces click on the **OPERATIONS** menu and select Interface Query from the drop down menu.

- Click on the **OPERATIONS** menu and select New Cross Reference from the drop down menu.



The Cross Reference screen will open in New mode.


- Enter a Reference Name.
- Enter a Reference Description.
- Click on the **SAVE** button  to save the cross reference.

The Cross Reference screen will open in Edit mode.

- Enter the name of the Web Work code into the Web Work cell and then name of the External file code into the External File cell and then click on **ADD NEW**. For example: If in Web Work the account code for Painting is PAIN2256 and in your accounting program it is 2256-5-5.01, you would enter PAIN2256 into the Web Work cell and 2256-5-5.01 into the External File cell. When a file is exported that contains the Web Work code PAIN2256 it will be exported as 2256-5-5.0.





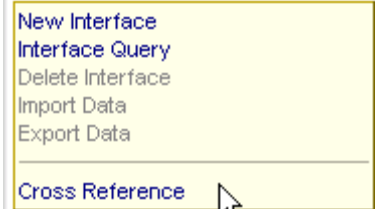
The cross-reference you just entered will not be listed in the table until you click on the  button.

- Continue adding new codes to the cross reference as required. When finished click on the  **OPERATIONS** menu to add another cross reference or to access the Interface module main screen.

9.1 Editing Cross References

To edit a cross reference that has already been setup in the Web Work system:

- Click on the **INTERFACE** module button  on the left hand side of the screen to open the Interface module.
- Cross References is contained within the Interface module. Click on the  **OPERATIONS** menu and select Cross Reference from the drop down menu.



The Cross Reference screen will open in Query mode.

- Perform a cross reference query to locate and open the applicable cross reference.
- To correct a typo or input error, delete the applicable selection and then re-enter the information as required.



Web Work	External File	
CHEV	90-98	Delete
PetroCanada	445	Delete
Texaco	23	Delete
<input type="text"/>	<input type="text"/>	Add New

- Click on **Delete** at the far right of the applicable entry.


The screen will be refreshed and the entry deleted will no longer appear in the table.

10.1 Deleting Cross References

To delete a cross reference:

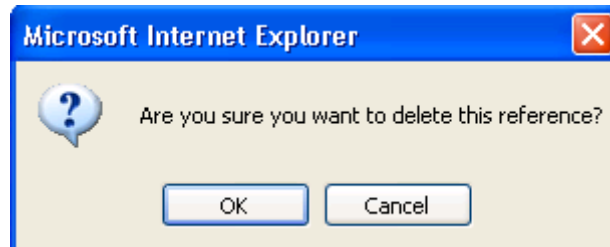
- Click on the **INTERFACE** module button  on the left hand side of the screen to open the Interface module.
- Cross References is contained within the Interface module. Click on the  **OPERATIONS** menu and select Cross Reference from the drop down menu.

The Cross Reference screen will open in Query mode.

- Perform a cross reference query to locate and open the applicable cross reference.
- Click on the  **OPERATIONS** menu and select Delete Reference from the drop down menu.



A message screen confirming you want to delete the reference will open as pictured below:










- Click on the **OK** button to delete the reference or on the **CANCEL** button to cancel this operation.


11.1 Cross Reference Queries

To access cross-references that have already been setup in the Web Work system, perform a query.

To perform a Cross-Reference Query:

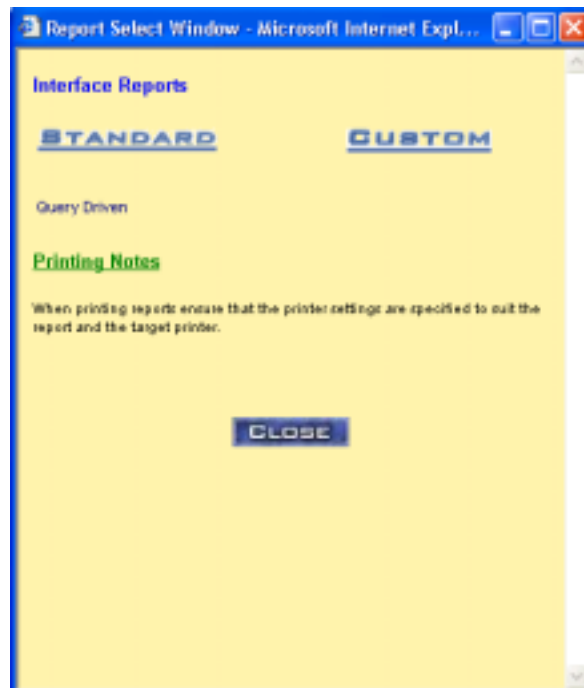
- Click on the **INTERFACE** module button  on the left hand side of the screen to open the Interface module.
- Cross References is contained within the Interface module. Click on the  **OPERATIONS** menu and select Cross Reference from the drop down menu.
- The Cross Reference screen will open in Query mode.
- Click on the **QUERY** button  at the right hand side of the Reference Name field to open the Cross Reference Selection screen.
- Click on the **RADIO** button  beside the applicable cross reference.
- Click on the **OK** button  to open the cross reference you selected in Edit mode.
- Click on the **FILTER** button  to show all entries for this cross reference or enter criteria into the Web Work or Input Field before clicking on the **FILTER** button , to filter records accordingly.

12.1 Interface – Reports

To access Interface reports click on the  **TOOLS** menu and select Reports from the drop down menu.



A screen similar to the one shown below will open:




Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Interface module will be displayed. To view all reports, click on the **REPORTS** module button  on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.


12.1.1. Creating Interface Reports

Reports cannot be created in the Interface module. To create an interface report click on the **REPORTS** module button  to access the report writer and create the report.

12.1.2. Printing Interface Reports

Interface reports can be printed from the Interface module or from the Reports module.


To print a report in the Interface module:

- Open the Interface module.
- Click on the  **TOOLS** menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

The report will open in Preview mode.

- Click on File and select Print from the drop down menu to print the report.

13.1 Links

When you are in the Interface module and you select Links from the  **TOOLS** menu, the Web Work Create/Edit Links window will open as shown below. You can view existing links or create new links using this feature.



You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.